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Grain and Feed

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Report Highlights:

Report includes state of crops to date. Official trade and milling data is also provided as is export sales, commitments, and shipments.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Buenos Aires [AR1]
[AR]

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Production

Wheat

The wheat harvest continues to move southward throughout the country. The following is a summary of the Secretariat of Agriculture, Livestock, Fisheries, and Food (SAGPyA) weekly report for December 1, 2005. SAGPyA estimates total planted area at 4.963 million has. As of December 1, only 714,530 has were harvested, approximately 55 percent less than the same time last year.

In Cordoba Province, harvest is almost complete. The delegations of Laboulaye, Marcos Juarez, and Villa Maria reported average yields of 1.6, 3.0, and 2.0 MT/ha, respectively. The San Francisco delegation reported variable yields of generally good quality.

Harvest in the Entre Rios Province finished with an average yield of 3.0 MT/ha of good quality. La Pampa Province experienced a delay in harvest due to last week's rains. Disparate yields are expected across the province due to the high variability of conditions found in the various lots. Average yields are expected to be between 1.4 – 1.9 MT/ha. Southern La Pampa Province suffered severely from the drought; yields are expected to be around 1.0 MT/has.

Harvest began this week in the Venado Tuerto delegation (Santa Fe Province). Depending on the damage caused by late frosts, yields ranged from 2.8 to 5.5 MT/ha. Yields in Cañada de Gomez are higher than anticipated, averaging 2.5 MT/ha, due to excellent climatic conditions after flowering and during grain fill. There have been some areas of this delegation affected by the late frost of September, but they were very few and isolated, and depend greatly on the elevation of the lots and planting dates. In Casilda delegation, harvest is moving along with the exception of the southeast Caseros department where a large area was affected by late frosts. In this area some producers may apply drying agents as some lots are showing signs of "re-sprouting". In the rest of the wheat area in Santa Fe, yields are superior to pre-harvest estimates, averaging about 3.4 MT/ha.

In the major wheat producing areas of Argentina, located in southern Buenos Aires Province, the crop is in generally good conditions. In Tandil delegation, lack of precipitation during October slightly affected the crop. Specifically in the Salado area, there are a few cases where the lack of rain affected grain fill, which will translate into a reduction in yields. Overall, however, the crop in this area is in good condition.

Lots in the Tres Arroyos delegation are very uneven in their development and health, making it very difficult to estimate yields. The majority of the crop is between the stages of spiking and filling.

Harvest began in the Junin and Pergamino delegations with yields of 3.9 and 3.5 MT/ha, respectively. A decrease in production of near 40 percent is expected in the Pigüe delegation, with respect to last year, due a drought that persisted throughout the growing season. Puan, Saavedra, Tornquist, and southern General Lamadrid are the most affected.

In the area of Salliqueló delegation, besides reductions in yields, harvested area is also estimated to decline due to drought. Many fields did not develop, while others were severely affected by the lack of precipitation. Additionally, in the areas of A. Alsina, Salliqueló, and Tres Lomas, 700 has were lost due to hailstorms on November 20 and 27.

Barley

Harvest began this week in the Buenos Aires province and is almost finished in Santa Fe. Average yields in both areas are 3.5 MT/ha. SAGPyA estimates total barley planted at 269,980 has., down slightly from last year. As of December 1, 36,110 has. were harvested.

Rice

Planting is finishing up in the Parana delegation of Entre Rios. Some producers have begun flooding their fields. SAGPyA estimates total planted area at 160,372 has (17,835 has of long-wide and 142,537 has of long-fine)

Corn

SAGPyA estimates total planted area at 3.055 million has, down slightly from last year. TO date only 2.33 million has were planted.

Planting in the Buenos Aires Province is nearly complete, with only a few lots in Salliqueló remaining to be sown. The crop is in good condition, developing normally with the most advanced fields showing 4 –6 leaves. There have been no reports of phytosanitary problems.

In Cordoba, fields in Laboulaye and Marcos Juarez delegations are developing normally, with about 10 leaves showing in the most advanced lots. On average, most fields are showing 4 – 6 leaves. In the San Francisco delegation, planting continued this week, after a pause during last week's rains.

Most of La Pampa Province benefited from last week's rains; however, the southern part of the province is still suffering from a drought. In the most advanced fields, plants have developed 4 –6 leaves.

Santa Fe Province also benefited from last week's rains with the crop showing 6 – 10 leaves, depending on the planting date. No plagues or phytosanitary problems have been reported. Avellaneda and Rafaela delegations are finishing up late planting on a few lots.

Trade

Wheat

Argentine Wheat Exports MT December 2004 - October 2005

HS Code	December	January	February	March	April	May	June	July	August	September	October	TOTAL
1001	1,406,068	2,180,382	1,614,019	1,202,719	874,125	667,598	476,349	482,836	535,554	351,018	397,152	10,187,819
1101*	1,127	1,426	724	1,276	716	790	407	1,741	489	445	739	9,880
190120*	30,406	32,736	26,218	31,288	19,905	30,225	33,478	29,614	34,642	30,609	42,414	341,536
190219*	1,627	1,468	3,353	3,866	3,336	4,087	3,900	4,610	3,905	2,651	3,667	36,471
190230*	29	14	43	94	66	4	41	27	17	39	60	435
Total	1,439,258	2,216,027	1,644,357	1,239,243	898,149	702,703	514,176	518,829	574,607	384,762	444,032	10,576,142

* Wheat Equivalent (product weight x 1.368)

Corn

Argentine Corn Exports March- October 2005

	March	April	May	June	July	August	September	October	TOTAL
1005	2,397,771	1,745,622	1,373,718	956,776	1,450,271	1,252,108	986,457	877,794	11,040,517

* Source: NOSIS: private data source based on Argentine Customs Data

Consumption

Argentine Milling, as of November 7, 2005 (MT)													
	Wheat Bread		Wheat Durum		Corn	Sorghum	Oats	Barley	Rye	Millet	Rice	Wheat	
	Mills	Feed	Mills	Feed								Flour	Meal
2004													
January	405,715	601	9,563	8	158,554	8,579	962	37,505	0	4	25,809	282,888	97,024
February	389,263	234	10,029	11	146,897	8,210	942	36,596	2	3	34,470	288,663	97,303
March	444,289	146	12,228	16	140,614	5,806	698	37,973	1	1	28,281	324,621	99,857
April	409,445	110	10,180	18	162,108	8,403	720	33,955	0	6	29,362	300,845	102,242
May	412,771	240	11,479	20	165,786	9,911	519	40,207	0	2	36,691	310,246	104,467
June	417,564	242	13,467	9	161,263	13,205	488	39,216	0	3	32,128	310,125	104,187
July	456,262	160	12,138	8	174,703	12,967	952	40,938	0	4	43,398	341,419	114,876
August	442,743	192	12,537	16	175,722	12,820	916	41,303	0	1	40,401	346,283	110,661
September	432,744	175	11,161	88	175,883	10,233	810	39,253	0	7	42,066	312,375	106,677
October	422,132	255	10,239	50	171,884	10,429	604	38,467	43	4	43,117	303,905	100,822
November	409,931	96	11,178	429	175,166	10,791	440	38,275	46	2	46,873	299,935	100,619
December	387,453	137	8,551	275	172,487	11,076	687	35,676	44	1	34,796	281,275	93,731
Total 2004	5,030,312	2,588	132,750	948	1,981,067	122,430	8,738	459,364	136	38	437,392	3,702,580	1,232,466
2005													
January	398,802	213	13,162	75	172,477	9,009	950	36,148	41	4	42,270	292,455	99,422
February	388,152	242	12,841	123	154,565	9,339	716	34,183	44	4	61,387	292,421	97,385
March	425,858	295	14,835	132	174,272	10,539	951	41,738	44	4	58,286	317,436	110,505
April	429,392	222	13,417	217	172,451	11,595	1,045	37,147	40	5	50,244	320,286	101,782
May	428,021	350	12,847	435	185,408	13,157	1,281	27,487	44	5	52,584	319,023	106,743
June	424,629	189	17,346	153	175,866	13,943	1,245	37,014	40	6	52,359	319,536	108,207
July	433,708	172	14,311	131	178,749	14,936	1,612	38,416	48	4	45,293	316,045	109,918
August	445,820	148	13,677	120	174,555	14,118	993	42,309	42	2	47,514	331,188	110,686
September	423,301	258	11,030	127	164,190	14,087	907	42,096	42	5	51,774	316,051	105,239
Total 2005	3,797,683	2,089	123,466	1,513	1,552,533	110,723	9,700	336,538	385	39	461,711	2,824,441	949,887

*Source: SAGPyA, Market Department

Export Sales

The following chart lists the accumulated export sales for the principal products according to harvest/production cycle. This data is updated daily by the SAGPyA and is based on declarations made by exporters.

Declared Export Sales
Registrations through 12/2/2005
MT

Product	Daily Registered Sales	Accumulated Registrations	Harvest/ Production
Wheat, Bread	436,000	1,707,017	05/06
Wheat, Bread	-	10,344,567	04/05
Wheat, Bread	-	9,845,902	03/04
Corn	100,000	985,000	05/06
Corn	148,500	12,735,500	04/05
Corn	-	11,172,710	03/04
Popcorn	1,000	5,000	05/06
Popcorn	800	144,481	04/05
Flint Corn	7,700	318,518	03/04
Sorghum	-	319,596	04/05
Sorghum	-	207,105	03/04
Rice	-	322,558	2003/2004
Rice	4,731	292,149	2004/2005
Rice	-	1,361	2005/2006

The following data represents export sales commitments by destination through December 2, 2005, compared to the prior year.

Wheat Export Commitments By Destination

(1000MT through 12/2/2005)

Country	2004/2005	2003/2004
Algiers	320	350
Bangladesh	410	0
Brazil	4175	4800
Chile	90	100
Colombia	105	120
Cuba	80	75
Egypt	1200	420
Indonesia	350	0
Iraq	0	110
Jordan	100	0
Kenya	400	470
Morocco	210	330
Nigeria	85	150
Peru	455	325
South Africa	545	485
Sri Lanka	400	310
Turkey	0	75
United Arab Emirates	430	0
Uruguay	40	150
Vietnam	85	0
Yemen	250	50
Other	1380	995
TOTAL	11110	9315

Source: Commercial Estimates, Food Markets Department

CORN EXPORT COMMITMENTS BY DESTINATION

1000 MT through 12/2/2005

Country	2004/2005	2003/2004
Algiers	685	700
Brazil	270	0
Chile	765	615
Colombia	285	125
Cyprus	0	80
Egypt	1680	400
Ghana	110	0
Indonesia	210	0
Israel	650	290

Korea	250	185
Malaysia	1580	700
Morocco	1065	380
Oman	40	50
Peru	940	900
Portugal	360	725
Saudi Arabia	670	800
Senegal	95	0
South Africa	210	500
Spain	820	750
Taiwan	115	0
Tunisia	380	250
Turkey	0	350
United Arab Emirates	320	260
United Kingdom	0	145
Vietnam	60	0
Other	935	1340
TOTAL	12495	9545

Source: Commercial Estimates, Food Markets Department

The following is export sales data based on reported purchases, sales, and shipments.

Export Sector Purchases - Sales - Shipments through 11/30/2005								
(1000 MT)								
Product	Harvest	Sales		Declarations of Purchases				Estimated Shipments
		Potential	Actual	Week	Total Purchased	Total to Price	Total Priced	Accumulated (*) Market Year
Wheat, Bread (Dec - Nov)	05/06	6500.0	1271.0	218.0	1809.9	353.5	47.1	
			(1182.0)		(2218.8)	(423.9)	(70.4)	
	04/05	11150.0	(**) 11111.9	34.3	11989.2	1224.0	998.8	10762.3
		(9350.0)	(9313.3)		(9352.9)	(1231.3)	(872.5)	(8596.8)
Corn (Mar-Feb)	05/06		835.0	69.5	1261.3	617.8	7.7	
			(98.0)		(613.2)	(436.7)	(5.9)	
	04/05	13000.0	12494.8	116.1	14085.9	2294.2	2021.2	11976.5
		(9700.0)	(9544.4)		(9183.1)	(1705.8)	(1473.6)	(8339.3)
Sorghum (Mar-Feb)	05/06			0.3	4.5	0.0	0.0	
					(39.0)	(0.0)	(0.0)	
	04/05	700.0	319.6	2.5	336.8	2.3	0.2	286.9
		(400.0)	(204.0)		(211.2)	(30.9)	(26.6)	(153.4)

Note: The number in parenthesis represents the prior year's harvest on the same date.

(*) Based on actual shipment data through August. From September onwards, based on expected vessel arrivals in ports.

(**) In wheat, 1.0 MMT included in the 04/05 harvest is from the 2003/04 harvest because it was dispatched during Dec 2004 (MY2004/05).

Purchases by Industry (1000 MT)

		Estimated Purchases	Declared Purchases	Total to Price	Total Priced
Through 11/9/2005					
	05/06	(*)	202.8	135.7	15.3
Wheat, Bread			(267.5)	(177.8)	(11.5)
	04/05	4846.2	4603.9	1788.5	1565.6
		(4174.3)	(3965.6)	(1703.4)	(1369.4)

Source: Food Markets Direction, SAGPyA